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International Dateline — The UK Perspective

by **Martin White** (Managing Director, Intranet Focus Ltd.) <Martin.white@intranetfocus.com>

NB: Please note that British spelling has been retained. — KS

Four become two

Over the last couple of years it has been the publishers that have been on the acquisitions trail, notably **Elsevier**, **Bertelsmann** and **Taylor & Francis**. Now it is the subscription agents, and this year there have been two important deals. The first has been that between **Swets** and **Blackwells**, which in most territories should result in there being relatively little overlap of interests. The major exception is the UK, which is an important market to both companies. Here the issues are more complex, relating to whether or not the combined operations have an unfair competitive advantage in the market. Resolving this issue to the satisfaction of the UK Government may take until the end of this year, and is not helped by a lack of reliable current statistics on the market. In a previous column I referred to the excellent work of the Library and Information Statistics Unit at **Loughborough University**, but in sizing the market for subscription services even LISU numbers are not adequate. In the meantime it has to be business as usual even though it is not "business as usual" and this inevitably causes problems for the staff of the two companies, and of course, for their customers.

Then in September, just a few days before an **Association of Subscription Agents** conference, **RoweCom** announced that it was going to acquire **Dawson Information Services Group** from **Dawson Holdings PLC**, a UK quoted company with diversified business interests. The value placed on the Group is put at \$56 million, and is still subject to the agreement of the shareholders at the time of writing this column. The man with the task of integrating the two businesses is **Charles Germain** as Vice President of International Operations, who was at one time, in the late 1980s, the Managing Director of **Faxon Europe BV** in Amsterdam. **RoweCom** clearly hopes that their e-commerce approach and expertise allied to the customer base of **Dawsons** will give them a significant competitive advantage on the world stage.

So where does this leave other subscription agents? Until this year the view of most of them was that there probably would be some further consolidation in the industry, but the pace at which this has happened has probably surprised them. Will there be a future for smaller agents? The answer to this question has to be a qualified yes, and much will depend on the relationships that have been built up with publishers on one side, and customers on the other, against a background of potential changes to the mechanism of scholarly publishing. The scale and diversity of the

purchasing of a major academic institution, and the global scope and support required by some multinationals, definitely plays to the very largest of agents. However, the industry probably needs to take heart from at least two implications. The first is that both the **Swets/Blackwells** and **RoweCom/Dawsons** deals are a reflection of the growing demand of the market for accessible content, not to take a competitor out of the market. Being a subscription agent is all about effective relationships, and these are built up through the expertise of people, supported by computer systems that can cope with the multiplicity of delivery formats and license agreements. The second is that, at some point in the future, there will be a much greater degree of electronic commerce between publishers and librarians, as well as publishers and readers. Since the cost of entry in terms of developing the computer infrastructure for e-commerce is decreasing quite rapidly, there should still be opportunity for a small agent to transact business electronically.

National site licensing projects

1999 has been the first year of operation for **National Electronic Site Licence Initiative** (www.nesli.ac.uk) in the UK academic community. For reasons beyond the control of **Swets**, who is the managing agent, this scheme has been slow to get off the ground. Gradually publishers are starting to support the scheme, and five publishers (including **Elsevier**) are participating with close to 50 separate institutions having signed-up for **NESLI** deals. For the 2000 subscription year, the number of publishers participating is likely to double. Linking between the new **Web of Science** service hosted by **MIMAS** (**Swets'** partner in the Managing Agent role) and **NESLI** fulltext is envisaged for 2000. There is no doubt that **Swets** and **MIMAS** have put an enormous amount of effort into **NESLI**, and hopefully all concerned will see the results next year.

Meanwhile, in Canada the next steps are being taken in the **Canadian National Site Licensing Project (CNSLP)** which is a national initiative comprising, at present, 64 Canadian universities. Its aim is to increase dramatically the quantity, breadth and depth of the most current research literature available to Canadian academic researchers and to provide expanded and equitable access to that content through electronic formats and network access/delivery mechanisms across the vast geography of Canada. In September, the post of Executive Director was advertised, reporting to the Steering Committee, and by the

time you read this an appointment should have been made.

Consortia purchasing

One of the drivers behind both deals has been the growth of consortia purchasing in the academic market. The UK has been in the vanguard of this approach, but now other European countries are also seeing an increasing number of consortia being established, as the membership list of the **International Coalition of Library Consortia** (<http://www.library.yale.edu/consortia>) expands.

The **Association of Subscription Agents** held a conference in London in September entitled **Agents, Libraries and Consortia—Customer Service and Value for Money**, which provided an opportunity for an exchange of ideas. For more details about the outcome of the conference, contact **Rollo Turner**, the Secretary-General of the **ASA** through the Web site at www.subscription-agents.org. **Cranfield University** has announced that it is hosting a special conference in December for European librarians to discuss the purchase of electronic publications. Held under the auspices of the **ICOLC**, the conference will be at **Cranfield University**, which is near Bedford, UK on 10 and 11 December 1999. The conference will follow the successful format of other **ICOLC** meetings, consisting of presentations from publishers of particular interest to European libraries and sharing experiences of the formation of library consortia in various countries in Europe. In general there is a lot of discussion, but still the jury seems to be out on how the benefits of consortia purchasing do work through the system to the end user. From the viewpoint of librarians faced with making less go farther, the initial attractions of the approach have to be offset against the resources consumed in meetings and negotiations, and the need to plan ahead over a much longer period than there is usually budget to cover. The **Library and Information Commission** (www.lic.gov.uk) has just released a report by **David Ball**, University Librarian of **Bournemouth University**, that indicates that library purchasing consortia have saved the sector just over 1% of its total expenditure on libraries. The report also comments that currently consortial agreements cover 78% of spending on books and 57% in serials.

Here come the mega book stores

Small subscription agents may be able to survive, but small bookshops in the UK, that's another problem. I recently went to visit Harry, a friend of mine who has an office in a small market town about 20 miles from Bristol. I had with me a copy of a new OUP

continued on page 88





Biz of Acq — Paperback Prebinding: Finding its Place in the Budget

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Column Editor's Note: "How can we squeeze more value from the monograph budget?" most acquisitions librarians continually wonder. Buying in paperback offers one choice. Budgetary pressures, and the use of alkaline paper in books issued by the majority of U.S. publishers, have compelled many libraries in recent years to purchase monographs with paperback bindings. Prebinding processes present libraries with viable options for obtaining hardcover bindings for paperback books, at a cost well below that of most cloth bindings. Yet how many libraries make use of prebinding processes? How do these libraries pay for such services? In this month's column, Neil Jaffe, General Manager of San Val, Inc., a binder that provides prebinding services, shares some answers to these questions, as well as suggestive ways to understanding the role of the binding industry in the "brave new world" of book production. — RR

Would you agree that improving the presentation, use, and preservation of library collections is an important task for acquisitions librarians? Would you also agree that it is difficult for librarians to balance the many trade-offs among cost, usability, and duration of quality use of materials? Add in the fact that every library has its own collection development policies, procedures, and budgets, and you've made these decisions even tougher to face.

I spend the greater portion of my day thinking about how to offer the most value among these trade-offs. Our company's mission is to help extend the life of books. We focus primarily on monographs, and specifically on new books. We work with book vendors all over the country to allow them to offer "shelf ready" books converted from paperback to hardcover. We refer to the process as "prebinding," a term with which 95% of you are familiar.

I decided it was time again to learn some new things about prebinding in libraries. Over the years, I've learned that few of you prebind

everything and the majority of you prebind something. I thought it would be valuable for me to compare current attitudes and trends to past empirical and anecdotal data.

This article details the results of my recent survey of acquisition librarians on their prebinding habits with a focus on which budget dollars are used for this service. In 1996, many of you will remember that I tested the power of technology by performing an e-mail survey of over 200 acquisition librarians.

After some preliminary research for this article, I determined that another survey would be appropriate. Our friend John Riley from Eastern Book Company suggested that I could get the best results through a posting to the subscribers of **Acqnet** (acqnet-1@listserv.appstate.edu).

This article reveals what I found out about how many libraries in a self-selected sample use a service for converting paperback books to hardcover books before they go on the shelf, and how libraries pay for this service.

continued on page 90

International Dateline from page 86

book on Bach, as I earn a living as a church organist, and my friend collects any recordings of music by Bach other than organ music. He liked the book, for which the list price was £40. The following morning he emailed me to say that he had ordered the book from **Amazon.co.uk** the previous afternoon, and it had arrived in the post that morning for a total cost of £27. Despite these price advantages, the number of book super-stores continues to grow. If you are visiting London do visit the new **Waterstones** bookshop in Piccadilly. Some of you will know the famous **Simpsons** store, which Waterstones has recently rebuilt with a lot of care into five floors of books, with around 270,000 titles. I visited it recently and was very impressed by the amount of space there was on each floor, making it a much more restful shop than **Borders**, which is near Oxford Circus. Of course, you will say, there is bound to be room in London for these large shops. However, I was in the historic town of Chichester a few days ago, whose main claim to fame is probably that it is the UK headquarters of **Wileys**. The population is less than 1% of that of London, and yet there is a large **Waterstones** in what was an old hotel, a branch of **Hatchards**, and

a branch of **Sussex Stationers**, which heavily discounts book prices. Add to that a branch of the national **W.H.Smith** bookshop chain and you have four booksellers within 100 yards of each other. The extent to which Internet-connected families browse in the shops and then buy online is of course an important question, but on the face of it bookselling the traditional way is still alive and well in the UK. However, some librarians are now considering whether it may be better to use Amazon as a supplier of books because of the discounts that are available.

New Chief Executive for the Library Association

In September **Dr Bob McKee** took up the post of Chief Executive of the Library Association. Bob McKee began his library and information career as a library assistant in **Birmingham Central Reference Library** while completing his doctorate. But he subsequently went on to teach, in secondary, further and higher education, as well as working in the IT industry. Prior to his appointment Bob was Assistant Chief Executive of **Solihull Metropolitan Borough** having formerly been Director of Arts & Libraries. He has served on the **British Library Advisory Council** and the former **Library & Information Services Council** for England, and

has always been active in professional affairs, including serving on the **Library Association Council** and as President of the **Association of Assistant Librarians** (now the **Career Development Group**). He has been a member of the **Library & Information Commission** since its inception in May 1995, and has had a significant involvement in the development of a number of important policy papers, including "Libraries: the Lifeforce for Learning." One of his urgent priorities is to guide through the proposed merger of the **Library Association** and the **Institute of Information Scientists** to create one unified organisation to represent the 20,000 or so information professionals in the UK.

The management of electronic journals

If you are reading this paragraph, the Editor has been generous in allowing me a commercial break. Before I left **TFPL Ltd.** in September to start up my own business my colleague **Peter Kibby** and I, together with assistance from **Suzanne Wilson-Higgins**, **Christine Stamison** and **Andrew Pitts** from **Blackwell's**, wrote the **TFPL/Blackwell's Guide to Electronic Journal Management**. This 106 pp. book is published by **TFPL Ltd.** (www.tfpl.com), but will also appear on the **Blackwell's** Web site at www.Blackwells.co.uk in due course. 🌱